Personal Financial Statement



PERSONAL INFORMATION

Complete this form for: (1) each owner, or more of voting stock, or (5) any person or	(2) each general partner, or (3) each limited entity providing a guaranty on the loan.	partner who owr	s 20% or more interest, or i	4) each shareholder owning 20% or
Name			Social Security #	Date of Birth
Address	City		County	State ZIP Code
Email Address			Residence Phone	Business Phone
Spouse's Name			Spouse's Social Security #	Spouse's Date of Birth
ASSETS		LIABILITIES		
Cash 🗌 At Legacy National	Bank \$	Credit Cards (D	escribe in Section 3)	\$
At Other Institution	ns \$			
Stocks and Bonds (Provide statements)	\$	Installment Acco	ounts/Autos 🗌 Paid by Busi	ness \$ Mo. Pymt.: \$
CSVLI (Face value \$)	\$	(Describe in Sec	ction 3)	
IRA or Other Retirement Accounts (Provide	e statements) \$	Installment Acco	unt/Other (Describe in Sectio	on 3) \$ Mo. Pymt.: \$
Real Estate (Describe in Section 1)	\$	Mortgages on F	Real Estate	\$
Notes Receivable	\$	Other Liabilities	(Describe in Section 4)	\$
Other Personal Property	\$	Total Liabilities		\$
Other Assets (Describe in Section 2)	\$	Net Worth		\$
Total	\$	Total		\$
SOURCES OF INCOME		CONTINGEN	T LIABILITIES	
Salary	\$	As Endorser or	Co-Maker	\$
Net Investment Income	\$	Legal Claims &	Judgments	\$
Real Estate Income	\$	Other Special D	Pebt	\$
Spousal Income	\$	Describe:		
Other Income* Describe:	\$			
* Alimony or child support payments need not be unless it is desired to have such payments counter	disclosed in "Other Income" ed toward total income.			
SECTION 1. REAL ESTATE (List each	n property separately. Use Real Estate Sup	plement for add	itional properties.)	
ltems	Property 1	I	Property 2	Property 3
Type of Property				
Address				
Date Purchased				
Original Cost				
Present Market Value				
Title in Name Of / % of Ownership	%		%	%
Mortgage Holder				
Mortgage Account Number				
Mortgage Balance				
Amount of Payment per Month / Year	□ Per Month □ Per Year		□ Per Month □ Per Year	□ Per Month □ Per Year
Home Equity Line / Loan	☐ Yes ☐ No If yes, amount: \$	☐ Yes ☐ No If yes, amount:		☐ Yes ☐ No If yes, amount: \$
If Rental Property, Rental Income Amount				





SECTION 2. OTHER ASSETS

Describe and, if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment and, if delinquent, describe delinquency.

re any of your assets held in trust? Pre any of your assets held in trust? Presses is trust. Revocable yes, please also describe the trust and complete the following Certification of Trust. Intervocable ertification of Trust							
Image: Section 1 Image: Section 2 Image: Section 2 ECTION 4. OTHER LIABILITIES applied taxes for prior years or other debts; describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches. RUST CERTIFICATION re any of your assets held in trust? Uses	SECTION 3. INSTALLMEN	T DEBT/CREDIT C	ARDS (Use attac	hments if necessary.	Each attachment must be ide	entified as a part of	this statement and signed.)
npaid taxes for prior years or other debts; describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches. RVST CERTIFICATION re any of your assets held in trust? No If yes, is trust: Inrevocable yes, please also describe the trust and complete the following Certification of Trust: Inrevocable Inrevocable entification of Trust	Name of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (Monthly, etc.)	How Secured or	Endorsed/Type of Collater
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ertification of Trust ertification of Trust ertification of Trust established the established the , dated , , d	are any of your assets held in tr	rust? 🗌 Yes	□ No If yes, is tru	ist: Revocable	Irrevocable		
	f yes, please also describe the	trust and complete th	ne following Certific	ation of Trust.			
ame of Trustor(s) Name of Trust be trust will not be revoked or substantially amended for the term of the loan without the consent of lender. This Cartification of Trust is being submitted in lieu of a opy of the trust instrument. The purpose of this declaration is to verify the existence and terms of the Trust, including the Trustee's unlimited power to borrow, guaranty, and encumber trust assets, lend them as collateral, and lease them to third-parties. There is nothing in the Trust Agreement that would prevent the lender from initiating tion on any setset. The Trust Agreement has specific language confirming the above. s Trustee(s) of the above-named trust, I/we declare the following: All currently acting trustees of the trust have been identified on this Certification of Trust and have signed this declaration. The trust is still in effect. It has not been revoked, modified, or amended in any manner that would cause the representations contained in this Certification of Trust to be incorrect. certify under penalty of perjury that all of the information on this form is true to the best of my knowledge. Date rustee's Signature Address Phone Number Date GREEMENT Address Phone Number Date and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or uaranteeing a loan. I understand FALSE statements may result in forfeiture of benefits and possible prosecution.	Certification of Trust						
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Jouse's Name Spouse's Signature Date	Name			Signature			Date
	Spouse's Name			Spouse's Si	ignature		Date



Real Estate Supplement



ADDITIONAL REAL ESTATE (List each p	roperty separately.)		
ltems	Property 4	Property 5	Property 6
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Title in Name Of / % of Ownership	1% 2%	1% 2%	1% 2%
Mortgage Holder			
Mortgage Account Number			
Mortgage Balance			
Amount of Payment per Month / Year	□ Per Month □ Per Year	 Per Month Per Year 	□ Per Month □ Per Year
Home Equity Line / Loan	☐ Yes ☐ No If yes, amount: \$	☐ Yes ☐ No If yes, amount: \$	☐ Yes ☐ No If yes, amount: \$
If Rental Property, Rental Income Amount			
ltems	Property 7	Property 8	Property 9
Items Type of Property	Property 7	Property 8	Property 9
	Property 7	Property 8	Property 9
Type of Property	Property 7	Property 8	Property 9
Type of Property Address	Property 7	Property 8	Property 9
Type of Property Address Date Purchased	Property 7	Property 8	Property 9
Type of Property Address Date Purchased Original Cost	Property 7	Property 8	Property 9
Type of Property Address Date Purchased Original Cost Present Market Value	1%	1%	1%
Type of Property Address Date Purchased Original Cost Present Market Value Title in Name Of / % of Ownership	1%	1%	1%
Type of Property Address Date Purchased Original Cost Present Market Value Title in Name Of / % of Ownership Mortgage Holder	1%	1%	1%
Type of Property Address Date Purchased Original Cost Present Market Value Title in Name Of / % of Ownership Mortgage Holder Mortgage Account Number	1%	1%	1%
Type of Property Address Date Purchased Original Cost Present Market Value Title in Name Of / % of Ownership Mortgage Holder Mortgage Account Number Mortgage Balance	1% 2%	1% 2%	1% 2% I%

